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Email Platforms Market Forecast, 2011-2015

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SCOPE

This study provides an analysis of the Email Platforms market in 2011, and its potential growth over the next four years. It provides market size, installed base and revenue market share by vendor, and forecasted market growth in terms of installed base and revenues, from 2011 to 2015. The study also provides an analysis of key vendors.

All market numbers, such as market size, forecasts, installed base, and any financial information presented in this study represent *worldwide* figures, unless otherwise indicated. All pricing numbers are expressed in $USD.

Throughout this report, the terms ‘email’ and ‘messaging’ are used interchangeably.

METHODOLOGY

The information and analysis in this report is based on primary research conducted by The Radicati Group, Inc in late 2011. It consists of information collected from vendors and users in global corporations via interviews and surveys.

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Secondary research sources have also been used, where appropriate, to cross-check the information collected. These include company annual reports and market size information from various market segments of the computer industry.

EXECUTIVE SUMMARY

- Email platforms have evolved from delivering basic email messages, to serving as the integration point for a wide variety of communication and collaboration technologies including; instant messaging (IM), mobility, web conferencing, team collaboration, social networking, and unified communications (UC).

- Email platforms are deployed on-premises by Enterprises or by Service Providers that offer cloud-based email services to their subscribers.

    - *Enterprise Email Platforms* – Enterprises have traditionally deployed email platforms on-premises as a way of delivering business email and other collaboration tools to their employees. More recently, Enterprises, particularly in the SMB, Education, Government, and Retail sectors have started to move away from on-premise offerings in favor of cloud-based email services, in order to reduce IT costs. Despite this trend, on-premises deployment of email platforms continues to be the predominant form of email deployment in the enterprise space.

    - *Email Platforms for Service Providers* **–** Service providers deploy email platforms in order to offer email services to their subscribers. Typically email services are offered as an addition to a wide range of other services. Consumer-oriented service providers deliver email experiences at no cost, as a way to increase the "stickiness" of their portals, and enrich the services they offer consumers. Business-oriented service providers offer enterprise-grade email functionality, which also includes security, mobility, and a wide range of other features aimed at business users. These email services are paid for on a subscription basis, and represent a new revenue stream for service providers.

- Today's workforce is bringing in more technology from their daily, consumer lives into their organization; most notably social networking sites, instant messaging, and mobile devices. Users expect to be able to use whatever devices or solutions they have in their daily lives, fully integrated into their business environments. This has led to the consumerization of many business applications, including email, and has forced email platform vendors to support and integrate with many of the technologies employees use as consumers outside the office.

- Due to the rise of cloud computing, many Enterprise Email Platform vendors are redesigning their email platforms to be suitable for deployment in the cloud by service providers. Generally this includes adding support for multi-tenancy, expanding scalability, improving high availability, and extending support for virtualization. In particular, Microsoft designed its latest Microsoft Exchange Server 2010 platform to be deployed as both an on-premises and a cloud-based email platform for service providers.

- Over the past couple of years, there has been greater activity in the market in terms of mergers and acquisitions. Over the next several years, we expect still further market consolidation due to email platform vendors finding it increasingly difficult to compete against Microsoft, which is now present in both the Enterprise and Service Provider segments, as well as the large number of legacy platform installed bases which represent attractive buyout targets.

- The proliferation of smartphone and tablet devices have made mobile support an important feature. Most subscribers want to be able to access their emails from their mobile device at any time. Today, Microsoft ActiveSync has become an industry standard, and a must have for all email platforms. Microsoft ActiveSync pushes emails, calendars and contacts to popular mobile devices running Apple iOS, Android, Windows Mobile, and others. Moreover, many email platform vendors have also developed mobile browser pages optimized for mobile devices, as well as specialized apps for Apple iOS, Android, RIM BlackBerry, and Windows Mobile devices.

- Figure 1, shows the total revenue growth of the Email Platforms market, including both Enterprise and Service Provider segments. The Email Platforms market will grow from nearly $5.5 billion in 2011 to over $6.5 billion by year-end 2015.

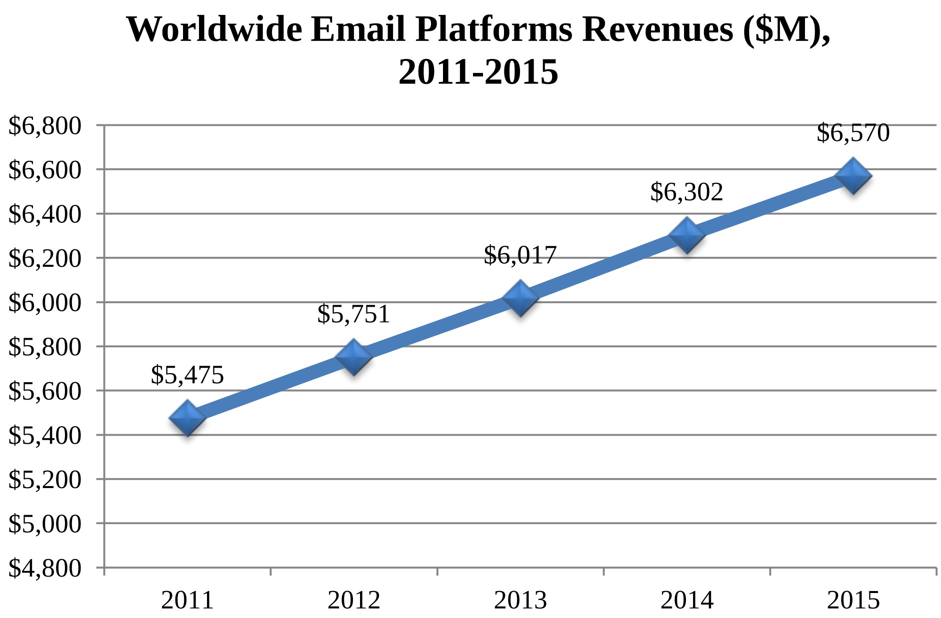

Figure 1: Worldwide Email Platforms Revenue Forecast ($M), 2011-2015

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